

Morningstar® Office Tip Sheet:

Assigning Default Report Settings

Once you create report settings in Morningstar Office, the next step is to assign your setting as the default option for your practice. Each advisor within your firm can set his/her own report setting preferences. Assigning a default setting not only saves time, but also ensures consistency when running both single and batch reports from Morningstar Office.

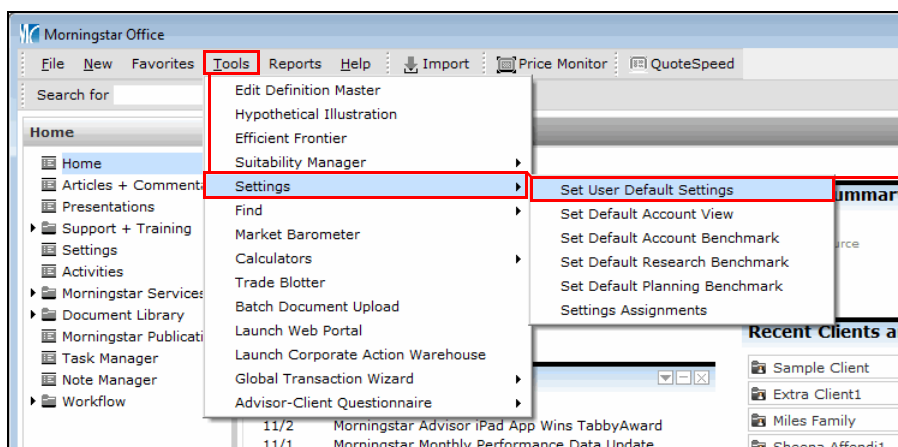
Overview

Report settings are assigned using the Tools menu from the menu bar at the top of the program. You need to do this only once, unless you decide to change the report settings you want to use as your default option.

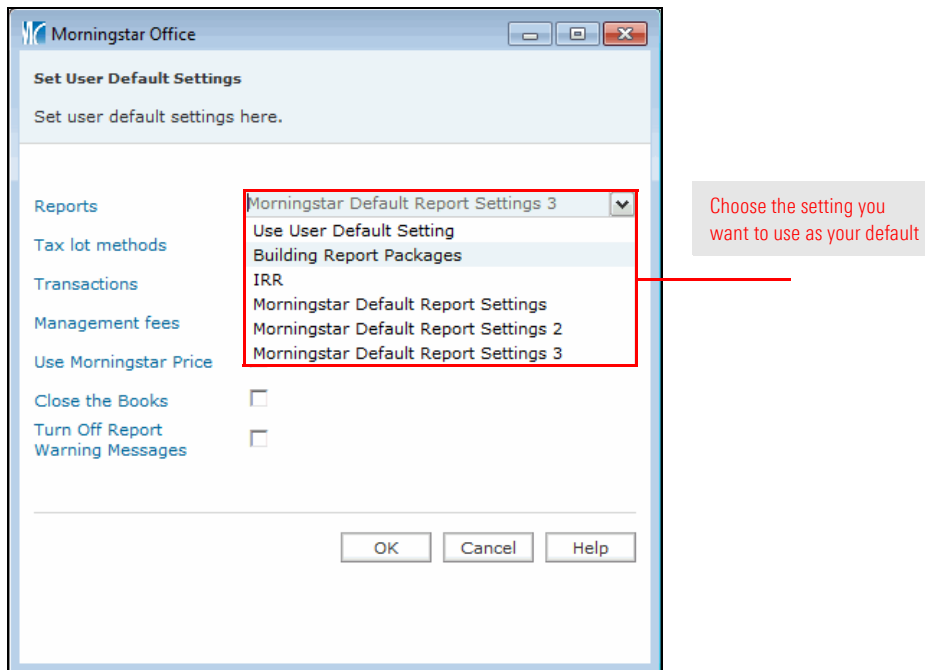
How do I assign a default report setting?

To assign default report settings for the reports you generate from Morningstar Office, do the following:

1. From the menu bar at the top of the Morningstar Office window, select **Tools... Settings... Set User Default Settings**. The Set User Default Settings dialog box opens.



2. From the **Reports** drop-down field, select the report setting you want to use as your default.



3. Click **OK**.

► Click [here](#) to view a companion video to this document.